Head & **Heart**

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Transformation Route Planner

Version 1.1
14/04/2026

Decision to transform

Having decided to change a core information system the **Executive Lead** provisions a **Project Manager**.

Executive Lead discuss moving to a new information system.

→ **Executive Lead** makes provision for the **Project Manager** accountability.

→ **Project Manager** identifies options, carries out a feasibility study, and reports back to **Executive Lead**.

→ **Executive Lead** tells **Project Manager** which **Target System** they have decided to adopt.

Setting up

The **Project Manager** provisions an **Information Manager** to own the **Target System** and a **Migration Manager** to own the **Staging Model**.

Project Manager provisions the **Information Manager** and **Migration Manager** accountabilities.

→ **Information Manager** identifies the **Target System** data schema and informs **Migration Manager**.

→ **Migration Manger** sets up an environment for the **Staging Model**.

Core transformation

The **Information Manager** and **Migration Manager** identify **Participating Teams.** They cooporate to ensure that the current business processes are reflected in the **Staging Model**.

Information Manager and **Migration Manager** identify **Participating Teams.**

→ **Information Manager, Migration Manager** and **Participating Teams** identify current business processes and data.

→ **Migration Manager** maps current data to the **Staging Model**

Missing data ≈ Missing business process

Non-definitive data ≈ Conflicting processes

Orphaned data ≈ Unsupported processes

→ **Information Manager, Migration Manager** and **Participating Teams** resolve barriers to migration.

Testing and refinement cycles

The **Information Manager**, **Participating Teams** and **Migration Manager** test the **Target System,** refining both the current business processes and the **Staging Model**.

Information Manager prepares the **Target System** for test data.

→ **Migration Manager** copies a snapshot of the **Staging Model** to the **Target System.**

→ **Information Manager, Migration Manager** and **Participating Teams** identify and resolve barriers to migration, then retest as required.

Data migration and final checks

The **Staging Model** is copied to the **Target System.** The **Information Manager**, **Participating Teams** and **Migration Manager** check that the **Target System** is ready to be adopted.

Information Manager prepares the **Target System** for test data.

→ **Participating Teams** stop using the existing systems.

→ **Migration Manager** copies a snapshot of the **Staging Model** to the **Target System**.

→ **Information Manager, Migration Manager** and **Participating Teams** make a final check of the **Target System**.

Transformation completed

The **Target System** is adopted and the transformation project is brought to an orderly finish.

Participating Teams start using the **Target System.**

→ **Migration Manager** archives legacy data and retires the **Staging Model**.

→ **Project Manager** deprovisions the **Migration Manager** accountability.

→ **Executive Lead** deprovisions **Project Manager** accountability and arranges **Information Manager** oversight.

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Introduction

Every meaningful collection of data is a model of the world that is continually being updated by the people who use it. Digital information tools are basically windows and levers for people to look at and interact with a model. On a mechanical level, this framework takes some digital tool that your organisation wants to adopt, the **Target System**, and uses a **Staging Model** to gather your current data into a single model of the world ready to be copied to the **Target System**.

On a social level, this framework brings the people who depend on your data into the **core transformation** phase and the **testing and refinement cycles**, so that the technical task of data mapping becomes an organisation-wide transformation exercise that allows your organisation to safely prepare for the move to the **Target System**.

Existing accountabilities

Executive Lead
These are the decision-makers in your organisation. They start and end the transformation process.

Participating Teams
These are the people that carry out tasks that use your data. Most of the benefit of a transformation will typically be due to improvements to how **Participating Teams** operate.

The tasks you choose to review in the **core transformation** will influence the outcome. Choosing multi-departmental tasks will lead to more fluid inter-departmental teamwork; choosing single department tasks will help formalise departmental accountabilities; and choosing tasks that involve external stakeholders will strengthen service delivery.

Assigned accountabilities

The three assigned accountabilities are batons of responsibility. A person can hold more than one at a time, and they can be passed on as required. The important thing is that each of them is always being held by someone.

Project Manager
Delegated to oversee the transformation process by the **Executive Lead**.

Migration Manager
Responsible for building a **Staging Model** that matches the schema provided by the **Information Manager** and securing it in line with the policies provided by the **Information Manager.**

Information Manager
Responsible for setting up the **Target System** during the transformation project and administrating it after the transformation project is complete.

Process notes

During the **Decision to transform**, when deciding which potential **Target Systems** to consider, in addition to the obvious options, such as sector specific solutions and Microsoft's Dynamics 365 [1], Microsoft offers free, professionally developed database schemas (such as the Common Data Model [2] and CDM for Nonprofits [3]), which could be used with Model-driven Power Apps [4] to provide a secure, compliant, bespoke system.

The framework was designed with a Power BI Semantic Model [5] in mind for the **Staging Model**. It has a wealth of tools for connecting to your current data, as well as having strong security for giving Participating Teams access to appropriate data. For a heavier duty **Staging Model** see Microsoft's guide "*Use a staging database for data migration*" [6].

The **core transformation** phase uses the technical exercise of data mapping to coordinate the process of social transformation needed for your organisation to prepare for the change to the **Target System**. Your people will have shaped the data that you currently hold, so when there appears to be an anomaly it is important to work with them to find a resolution, in particular:

- Missing data tends to happen when there is some business process that nobody is taking responsibility for;
- Non-definitive data tends to happen when there are overlapping business processes with multiple people taking responsibility for a process;
- Data that can't be mapped into the new schema, orphaned data, tends to happen when there is some business process that isn't supported by the **Target System.**

Often, the biggest challenge in a major transformation project is due to teams that were used to working with their own local model of the world having to find new ways of working with other teams in a shared model of the world. Building a **Staging Model** first gives your organisation the opportunity to adapt before you make the final commitment to move to the **Target System**.

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